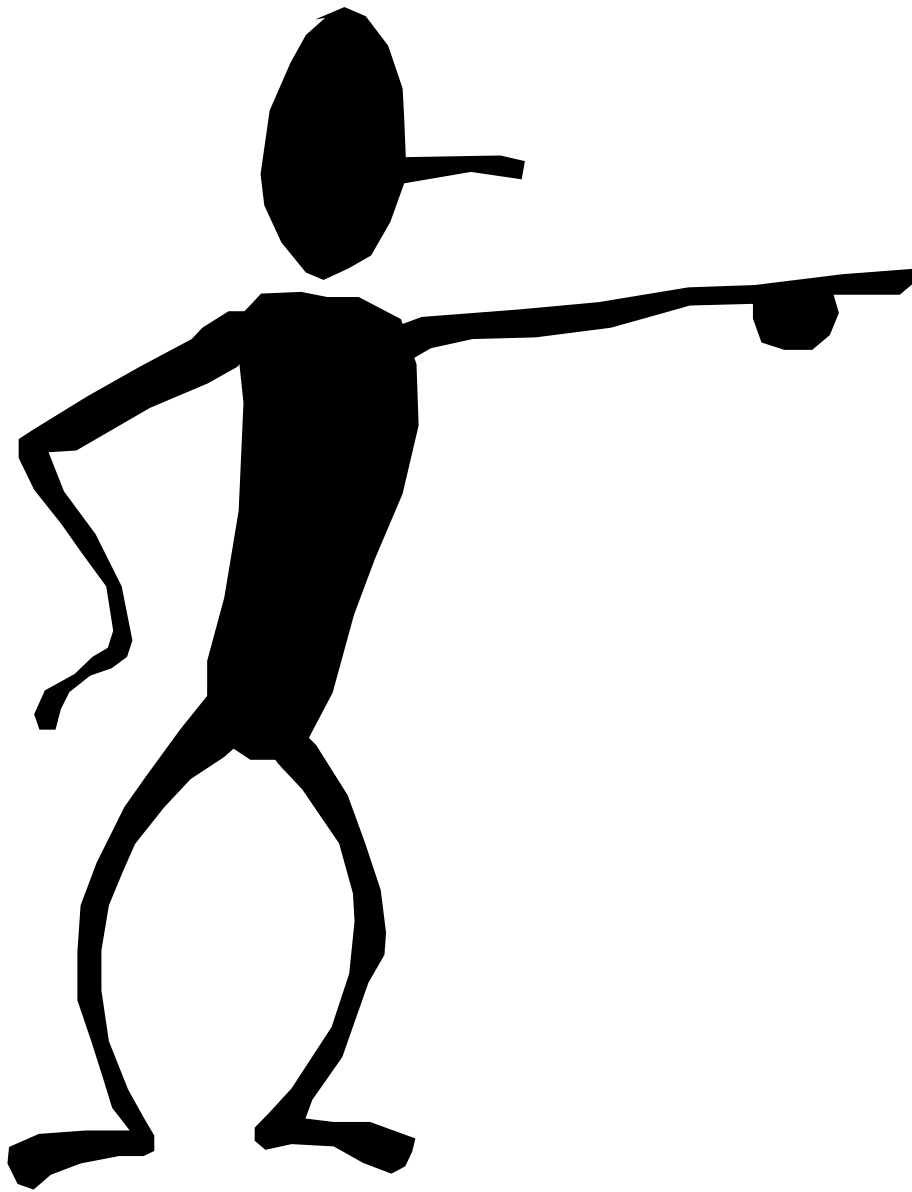




Using Telephone Interviews For Intake

County of Riverside Self-Sufficiency Division

Marcetta Brewster, Regional Manager
September 5 & 6, 2012



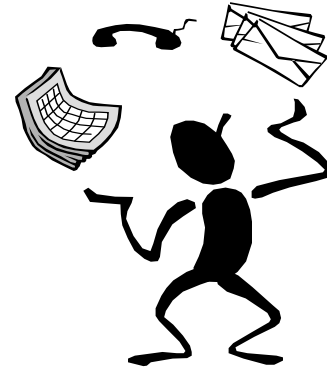
Agenda

- ▶ Business Model
 - District Office
 - Customer Care Center
- ▶ Why ?
- ▶ When?
- ▶ Modernization
- ▶ Best Practices
- ▶ Outcomes
- ▶ Lessons Learned
- ▶ Questions

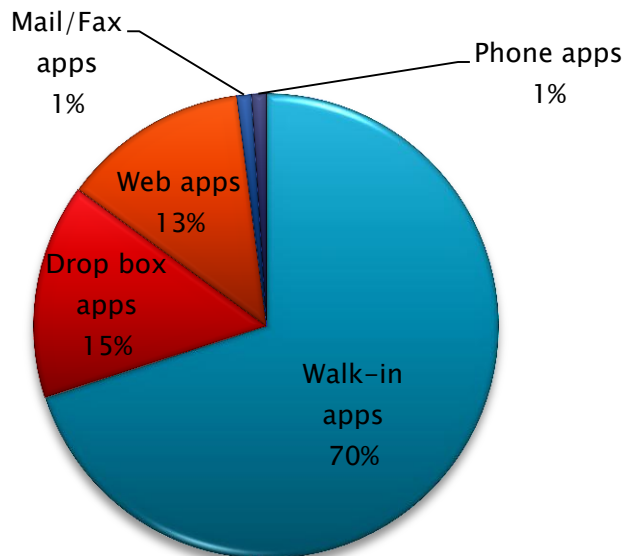
Intake Process Business Model

District Office= Traditional F2F intake model

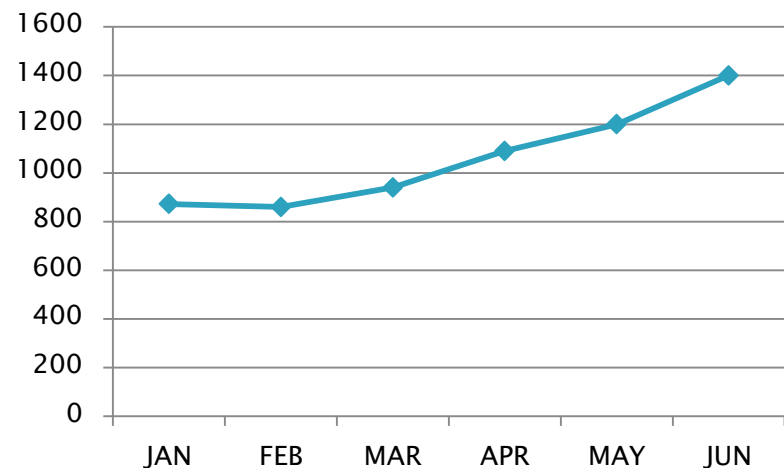
- ▶ Access point(s):
 - Walk-in apps 70%=100% f2f interviews
 - Drop box apps 15%=100% phone interviews
 - Web apps 13%=100% phone interviews
 - Mail/fax apps 1%=100% phone interviews
 - Phone apps 1%=100% phone interviews
- ▶ District office applications represent
 - 67% of all CF applications countywide



Application Type (received per Month)



Total Cal-Fresh Apps
(received per month)



Intake Process Business Model cont'd

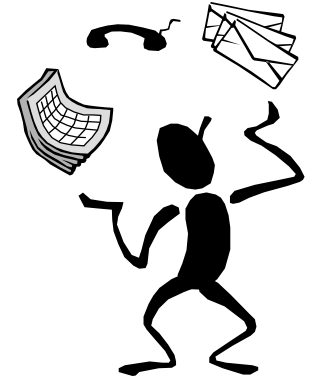
Call Center= Centralized n/f2f intake model

► Access point(s)

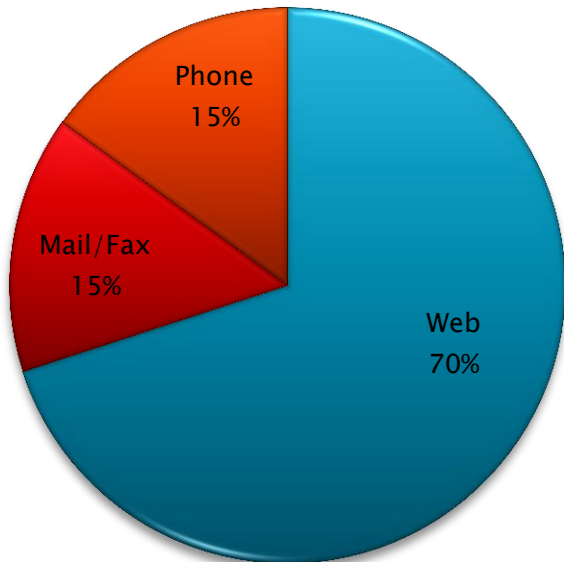
- Web apps 70%= 100% phone interviews
- Phone apps 15%= 100% phone interviews
- Mail/fax apps 15%= 100% phone interviews

► Call Center Intake workload represents

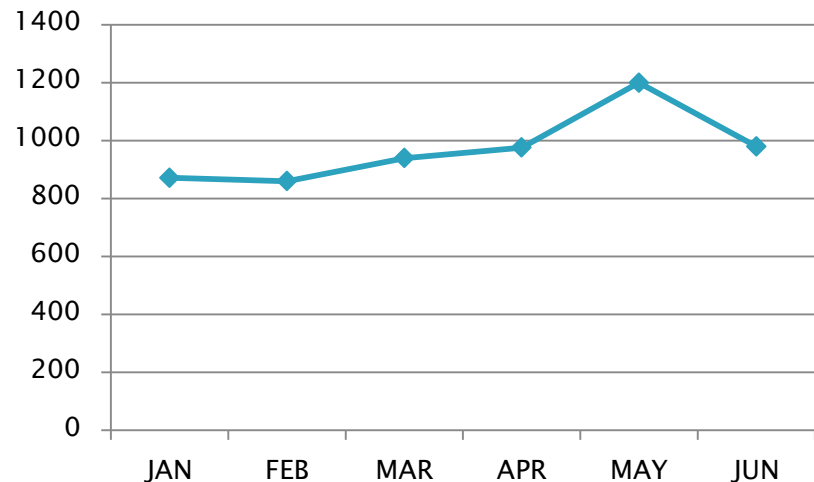
- 33% of all CF applications countywide



Application Type (received per Month)



Total Cal-Fresh Apps
(received per month)



Why phone interviews?

- ▶ Streamline the intake process to:
 - Increase program access
 - Increase participation
 - Improve processing timeliness
 - Reduce district office/lobby traffic
 - Keep up with demand/application volume
 - Utilize phone technology to full capacity
 - Enhance customer service
 - Improve efficiencies/workload management
 - State mandate



When are phone interviews utilized?

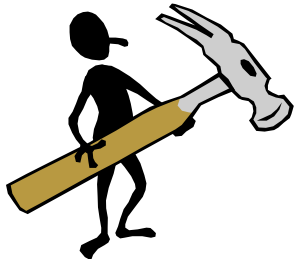
▶ At all application entry points

- Web
 - Mail
 - Phone
 - in-person
- Available to all non-assistance CF households at intake & at RE
 - Available to all elderly/disabled households

▶ Exceptions to this practice

- F2F applications (interview held at time application submitted)
- When applicant lacks access to a phone
- Applicant request
- Other misc. eligibility related reasons



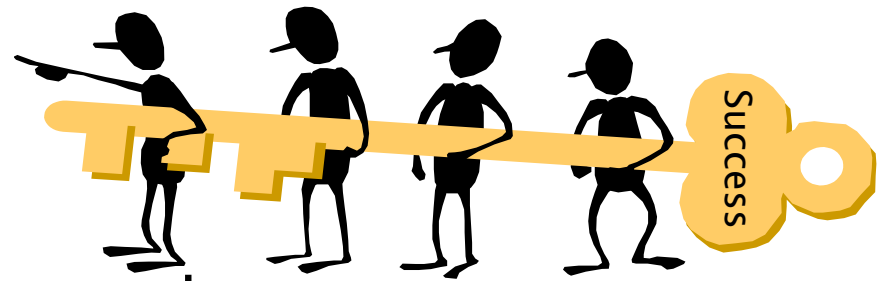


Modernization Efforts

Service Delivery Improvements

- Moved the non-F2F CF/MC Program workloads out of the Metropolitan Riverside district offices via:
 - Implementation of a “Customer Call Center” (CCC)
 - CCC encompasses both intake & continuing MC & CF program workloads
- Business process standardization improvements
 - Lobby management process re-design
 - Resulting in increased same day service & benefit delivery
- Utilization of waiver(s)
 - F2F waiver
 - SFIS law
- Utilization of the “phone” interview practice
 - 100% of all web/mail/phone applicants granted a phone interview
 - 100% of all RE/applicants granted a phone interview

Best Practices



- Telephone Triage/Pre-screening
- Lobby Triage
- Conduct all phone interviews within 24 hours of the app date
- Missed appointment team
- Early & consistent collaboration with CBOs
 - To enhance & increase outreach activities & access

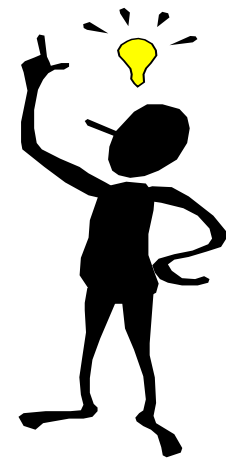
Outcomes

Results Matter

- Timely/accurate application processing
 - 1% intake delinquency rate
 - 5% error rate
 - No intake workload backlog for past 2 years
- Expedited service compliance–
 - 90% compliance
- In person F2F interviews for NFF applications eliminated
- Increased program access & participation
- Decreased missed appointment rate (30%)
- Decrease in district office traffic
- Decrease in customer complaints
- Increased external/internal customer satisfaction



Lessons Learned



Must haves:

1. Adequate eligibility/office support staffing
2. Phone interview training
3. Customer service training
4. Interview script(s)
5. Document imaging proficiency
6. Adequate interpreter support
7. Client primary/secondary phone numbers

Questions

